Massachusetts Department of Revenue

Division of Local Services

ROLLOVER UTILITIES
RPIS VERSION 3

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RPIS Version 3
Rollover Utilities User Guide

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Introduction

At the end of each fiscal year certain data maintenance tasks must be performed to "close" one year and "open" another. The Oracle RPIS system attaches a year tag to each data type in order to preserve an accurate picture of each parcel as of a certain fiscal year. The various rollover programs allow data to be copied from one year to the next so that maintenance can continue without changing "frozen" data. There are two rollover programs in RPIS Version 3: Value Rollover and Year Tag Rollover.

Value Rollover copies data from the Valuation and Parcel records to a new Value History record using the same year tag. This Value History record can be used to find the final values and use code for a particular parcel in a specific fiscal year.

Year Tag Rollover copies all data from one fiscal year to another. It is possible to copy abatement and exemption records to a new year separately from the rest of the records; this allows the creation of a new year before all abatements and exemptions have been processed.

It is recommended practice to run Year Tag Rollover before running Value Rollover, mainly to save space. Running Value Rollover before Year Tag Rollover creates the same value history record under two parcel years, which isn't really necessary. Nothing is harmed, however by running Value Rollover before Year Tag Rollover.

Important Note for CSC Website users:
Uploading data to the CSC website for public access viewing should be done before running Value Rollover. The prior value fields in the Valuation table will be filled with the Final Values when Value Rollover is run; this preserves the values so that, when value finalization is run, the previous year's values remain in the prior year fields for comparison. Once Value Rollover is run on a certain year, the final values and prior values in the Valuation table will be identical. Uploading data to the CSC website as soon as values are certified by the DOR (after LA4 approval) will help to ensure the accuracy of the fiscal year's data.

Running Year Tag Rollover

Purpose

Year Tag Rollover prepares the database for the next fiscal year. Because all data types have a "year tag" attached, it is necessary at some point to either change the year tag to the next year or to copy all data from one year to the next. The Year Tag Rollover utility accomplishes this task.

How to run Year Tag Rollover

Value History Rollover is a utility program. <u>You must have permission, or user rights, to run RPIS Utilities in order to run Value History Rollover.</u> If you do not have the proper user rights to run utility programs, the menu options will appear in gray type on the menu, indicating that they are not available.

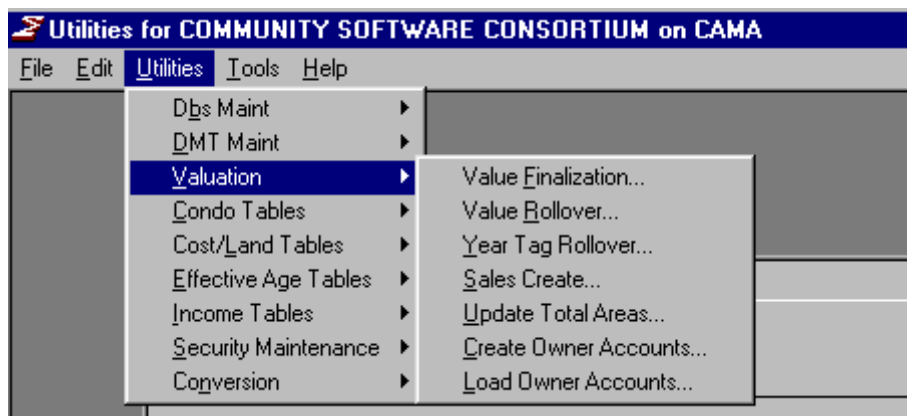1. Click Utilities on the menubar, then click Valuation. The Valuation Utilities menu will appear.

Figure 1 – the Utilities module, Valuation menu

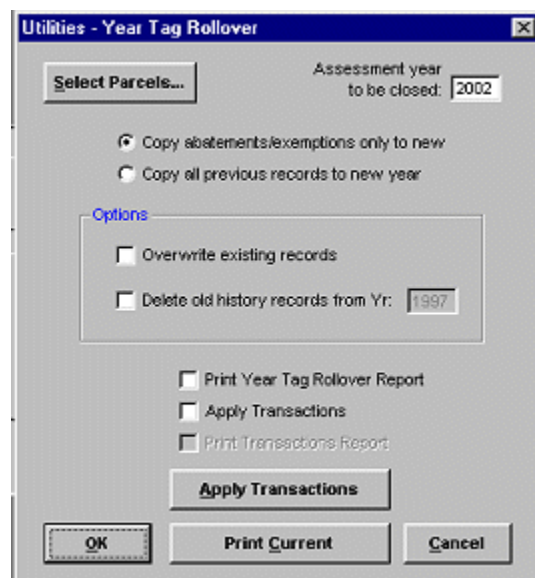2. Click Year Tag Rollover to start the program. The Year Tag Rollover dialog box will appear.

Figure 2 – Year Tag Rollover dialog box

3. Enter the fiscal year to copy from in the Assessment Year to be Closed box. The program will add one to the year entered in this box and use the result as the new year tag.

Figure 3 – select year

4. Choose the copy options:

Figure 4 – copy options

▪ <u>If you wish to keep the current year's data</u> and create a copy of each parcel with a new year tag, click the radio button next to "Copy all previous records to new year." All existing records will be copied with the new year tag.
   Note: This process can be lengthy – it should be run at a time when no other activity is planned for the computer or server.
▪ <u>If you do not wish to keep the existing year's data</u>: click the radio button next to "Copy abatements/exemptions only to new." Rollover will change the year tag of each existing record to the new year - only the abatement and/or exemption records will be copied to the new assessment year's data (records will exist for both years.) Use this option only if you wish to keep only one set of records on the system. **THIS OPTION EFFECTIVELY DELETES ALL CURRENT YEAR DATA EXCEPT ABATEMENT AND EXEMPTIONS RECORDS**. The data will still exist, but it will have the new year tag attached; you will not be able to access data by using the old year tag.

5. Select the parcels to be processed by clicking the Select Parcels button. The Parcel ID Selection window appears.

Figure 11 – Parcel ID Selection

In the Parcel ID Selection screen:
▪ Use the Tab key to move from column to column.
▪ Click the gray box to the left of the Year column to select a row.

- Use the Insert key to add a new row.
- Use the Delete key to delete a selected row.

Processing a range of parcels: press the Insert key to add a new parcel selection row, or type over an existing row. To process Real Property Inventory parcels, click the Inventory radio button and enter the parcel year, the beginning Parcel ID and the ending Parcel ID.

Processing single or non-contiguous parcels: enter the Parcel ID(s) in the Beginning Parcel ID column only.

Using a previously stored PID table: click the Open button and select a user name and PID Table name to use for processing. NOTE: PID files created and stored in RPIS Version 1 cannot be used in Version 2.

After selecting parcels for processing, click the OK button to return to the Year Tag Rollover dialog box.

6. Select the options available in the Options section of the dialog box:
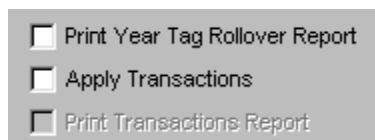
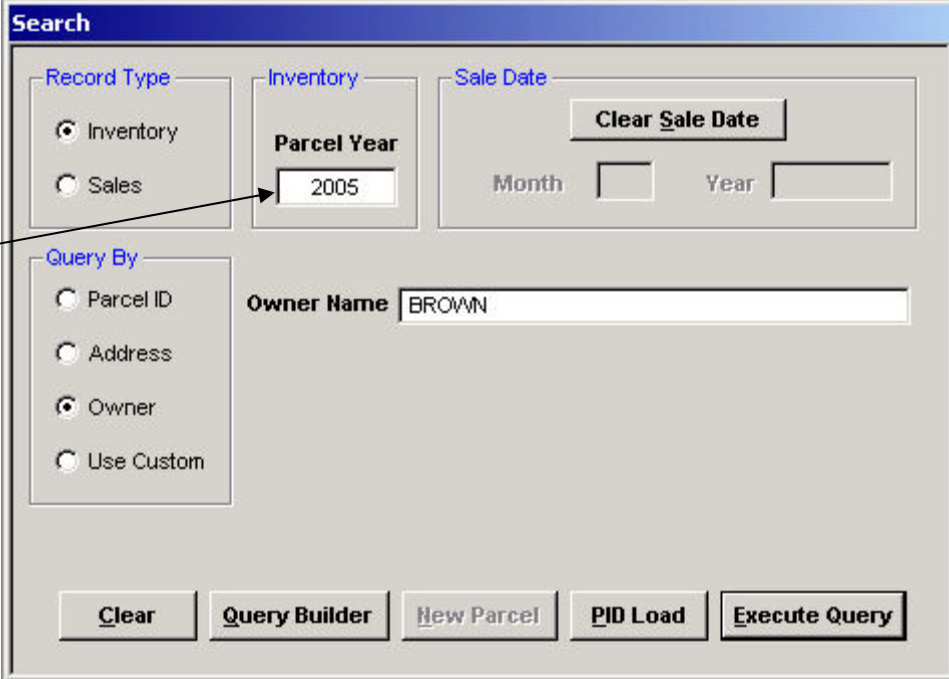**Figure 12 – Misc. options**

- Print Year Tag Rollover Report – check this box if you wish to automatically print a copy of the Rollover report. If you leave this box unchecked the report will appear on screen at the program's completion; you may then print the report from the screen display if you wish. You may also print the report at any time after program completion by clicking the Print Current button.
- Apply Transactions – check this box to automatically apply the Value Rollover Transactions. If you leave this box unchecked you may apply the transactions manually by clicking the Apply Transactions button.
- Print Transaction Report – if you check the Apply Transactions box you can have the system automatically print a transaction summary by checking this box. This option is only available if you check the Apply Transaction box; it remains "grayed out" when the transaction box is unchecked (see Figure 12.)

After selecting options, specifying a parcel ID selection and a entering a fiscal year, click OK to run Year Tag Rollover. A process status window will display the program's progress. When the program has finished processing parcels it will display a completion message. Click OK to acknowledge the message and clear the screen.

7. Apply the transactions – if you did not check the Apply Transactions box before running Year Rollover you can apply the transactions now by clicking the Apply Transactions button.

Results

At the end of the Year Tag Rollover process a new set of records will exist in the RPIS database. These records will be listed under the new year tag. To view any of these records, enter a parcel id and change the entry in Parcel Year to the new year.

Figure 13 – change the Parcel Year in the Search screen

Running Value Rollover

Purpose

At some point in the fiscal year you will have finalized your values in order to set a tax rate. You may wish to electronically preserve these values, along with the current state use code, for each parcel in your database. Because each data type has a year tag, the values and use code are already "attached" to a specific year; for any specific year you can find the values in the valuation record, and the use code from the parcel record, by searching for a parcel id with the desired year tag. There is one potential problem with this method: because it is possible to run cost and/or value finalization at any time, on data from any particular fiscal year, it is also possible that your "finalized" data may be accidently overwritten. Creating a value history record will safeguard the final values and use code for each fiscal year.

How to run Value Rollover

Value History Rollover is a utility program. <u>You must have permission, or user rights, to run RPIS Utilities in order to run Value History Rollover.</u> If you do not have the proper user rights to run utility programs, the menu options will appear in gray type on the menu, indicating that they are not available.

To run Value rollover follow these steps:

1. Click Utilities on the menubar, then click Valuation. The Valuation Utilities menu will appear.
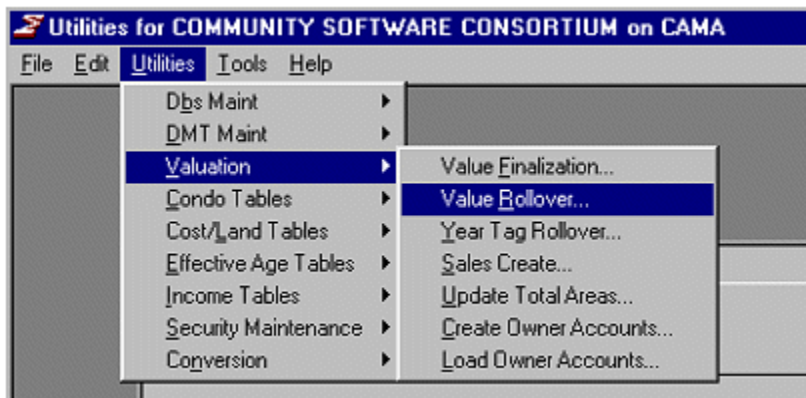

Figure 5 – Valuation Utilities Menu

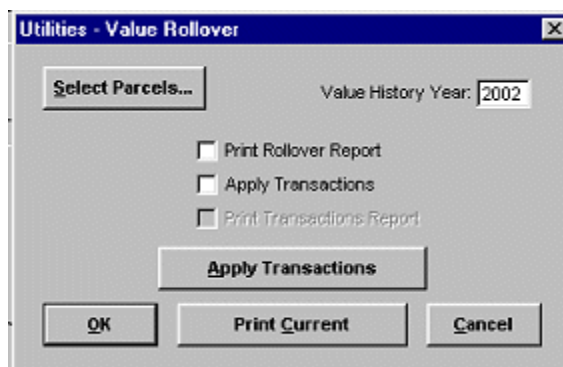2. Click Value Rollover to start the program. The Value Rollover dialog box will appear.

Figure 6 – Value Rollover dialog box

3. Enter the data's fiscal year in the Value History Year box. The value entered will be used as the Value History record year tag.

Figure 7 – enter a fiscal year

4. Select the parcels to be processed by clicking the Select Parcels button. The Parcel ID Selection window appears.

Figure 8 – Parcel ID Selection

5. In the Parcel ID Selection screen:
   ▪ Use the Tab key to move from column to column.
   ▪ Click the gray box to the left of the Year column to select a row.
   ▪ Use the Insert key to add a new row.
   ▪ Use the Delete key to delete a selected row.

Processing a range of parcels: press the Insert key to add a new parcel selection row, or type over an existing row. To process Real Property Inventory parcels, click the Inventory radio button and enter the parcel year, the beginning Parcel ID and the ending Parcel ID.

Processing single or non-contiguous parcels: enter the fiscal year and Parcel ID(s) in the Beginning Parcel ID column only.

Using a previously stored PID table: click the Open button and select a user name and PID Table name to use for processing.

After selecting parcels for processing, click the OK button to return to the Value Rollover dialog box.

6.   Select the miscellaneous options available on the Value Rollover dialog box:
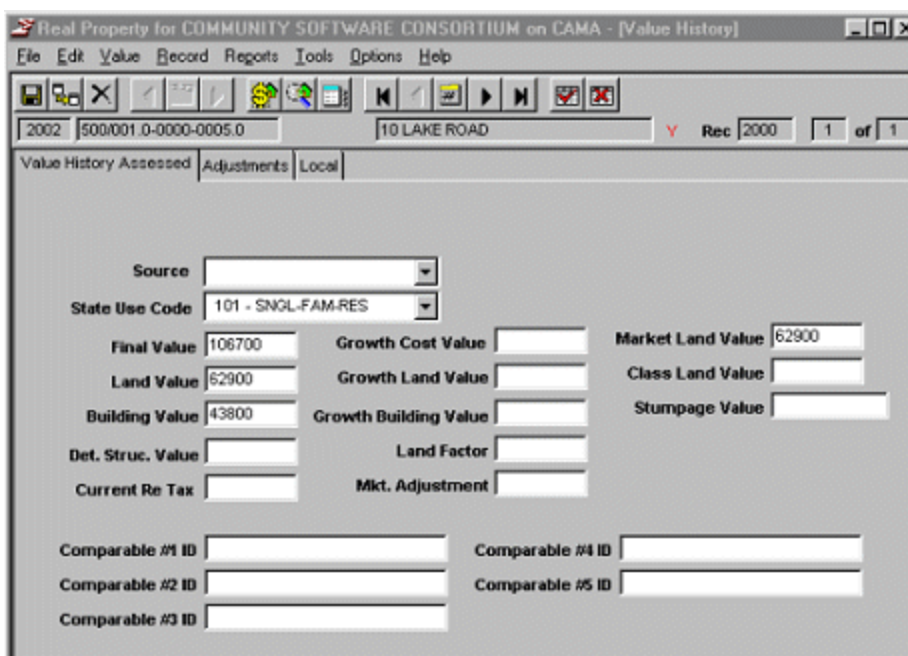
Figure 9 – Misc. Options

- Print Rollover Report – check this box if you wish to automatically print a copy of the Rollover report. If you leave this box unchecked the report will appear on screen at the program's completion; you may then print the report from the screen display if you wish. You may also print the report at any time after program completion by clicking the Print Current button.
- Apply Transactions – check this box to automatically apply the Value Rollover Transactions. If you leave this box unchecked you may apply the transactions manually by clicking the Apply Transactions button.
- Print Transaction Report – if you check the Apply Transactions box you can have the system automatically print a transaction summary by checking this box. This option is only available if you check the Apply Transaction box; it remains "grayed out" when the transaction box is unchecked (see Figure 5.)

7. After selecting options, specifying a parcel ID selection and entering a fiscal year, click OK to run Value Rollover. A process status window will display the program's progress. When the program has finished processing parcels it will display a completion message. Click OK to acknowledge the message and clear the screen.
8. Apply the transactions – if you did not check the Apply Transactions box before running Value Rollover you can apply the transactions now by clicking the Apply Transactions button.

Results

Each parcel in the parcel ID selection will now have a Value History record for the year specified in the options. A sample is shown below.

Figure 10 – the Value History record

For training and technical support…

Contact any of the DOR CAMA Information Technology Staff for further assistance or to ask about training opportunities.

CAMA Support Help Desk
Monday – Friday 9A-4PM excluding holidays
1-800-521-5536   (ask for CAMA Support or extension 62350)

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Mike Quinlivan	508-792-7300 extension 22313	quinlivanm@dor.state.ma.us
Linda Bradley	617-626-2394	bradleyl@dor.state.ma.us
Paul Corbett	617-626-2366	corbettp@dor.state.ma.us
Don Reynolds	617-626-2356	reynoldsd@dor.state.ma.us
Arnold Kanter	617-626-2303	kanter@dor.state.ma.us

All Boston staff can be reached by dialing their direct numbers or through the CAMA Support Help Desk.

CAMA Version 3 User Guides, our Support Guidelines and other useful information from the Information Technology section of the Division of Local Services can be found online at http://www.dls.state.ma.us. Information about the Community Software Consortium can be found online at www.csc-ma.us.

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